ISG Case Study Research

Case Study Submission Form

Case Study Research Submission

☐ I hereby acknowledge and affirm that I understand and agree to the case study submission, validation, evaluation and award process terms and conditions for participating in this program. Please read the Case Study Research Agreement for more details.

Your contact details
*Mandatory fields
- Name* _____
- Email* _____
- Name of alternate contact*_____
- Email address of an alternate contact* _____
- Provider company name* _____
- ISG relationship contact* (Write "none" if you do not have one)
  _____

The ISG Case Study Research Framework is utilized for both the ISG Paragon Awards and ISG Case Study Standouts. The ISG Paragon Awards recognize both the client and the provider, identifying potential winners. To be considered for a Paragon Award, we need your permission to name the client company in press releases and during the awards ceremony. For Case Study Standouts, you have the option to allow ISG to name the client in the published case study. Alternatively, ISG can use a general description to anonymously refer to your client, such as "a major retailer" or "a regional bank."

Please select most appropriate

Paragon awards
- Yes, I'd like to participate in the Paragon Awards. ISG may name my client in a press release and during an in-person ceremony (You have the option to keep the client's name anonymous at a later stage)
- No, I do not want this case study to be considered for the Paragon Awards

Case Study Standout
- Yes, ISG may name my client in both press releases and for the ISG Case Study Standout recognition program
- Yes, ISG will use a general description to anonymously refer to your client in the final case study, such as "a major retailer" or "a regional bank" for the ISG Case Study Research Standout recognition program
- No, I do not want this case study to be considered for the ISG Case Study Standout recognition program but for ISG Research including CPQ Process

Client name

(This is necessary for ISG's internal use. Please write the full name of the company and not an anonymous description.)

_____

Do you have a preferred anonymous general description for your client that ISG should use?

_____

Location

Select the regions where the scope of this case study impacted the business of the client. This is NOT the locations where the engagement was delivered from. You may select one or more regions or indicate that the work had a "Global" focus if it impacted four of more regions.

- ☐ Asia Pacific excluding India
- ☐ Australia and New Zealand
- ☐ DACH and Eastern Europe
- ☐ India
- ☐ Middle East and Africa
- ☐ North America
- ☐ South America
- ☐ South Europe (France, Italy, Spain and Portugal)
- ☐ UK, Ireland, and Scandinavia
- ☐ Global

Industry
 (Which market was <u>primarily</u> impacted by this work.)
- Banking and Financial Services
- Business Services
- Communications
- Consumer Products
- Energy
- Healthcare and Life Sciences
- Insurance
- Manufacturing
- Media and Entertainment
- Public Services
- Publishing and Education
- Retail
- Technology
- Travel and Logistics
- Utilities

Annual Revenue (USD)
(Select the most appropriate one)
- Less than $250 million
- $250 million - $500 million
- $500 million - $1 billion
- $1 billion - $3 billion
- $3 billion - $5 billion
- Greater than $5 billion

Select the regional Paragon award program where you would like to contest:
(Select the most appropriate one)
- Paragon North America
- Paragon LATAM
- Paragon Europe

The ISG Paragon Awards honors providers and clients across six categories.
(Select the most appropriate one)

- **Excellence** This category recognizes outstanding delivery and excellence by a technology or service provider in the provision of services to a client or clients.
- **Innovation** Recognizing the importance of imagination in helping organizations to future-proof their businesses as well as the entrepreneurial spirit needed to help

them make a change in how they serve their customers. Nominees can include individuals, organizations or a combined client and provider team.

- **Transformation** This category recognizes the fundamental transformation of an organization or key business function. It rewards both client and service provider.
- **Sustainability** This category recognizes exceptional implementation of Environmental, Social, and Governance (ESG) strategies that have delivered measurable outcomes for clients, consumers, communities and/or employees.
- **AI Pacesetter** This category recognizes substantial business impact through the adoption of AI.
- **Partnership of the Year** – This category celebrates partnerships that demonstrate exceptional collaboration and mutual success, contributing to outstanding customer outcomes.

Please note: The AI and Sustainability categories focus on specific, outcome-driven initiatives, providing an additional lens comparing to the broader categories of Excellence or Transformation submissions. This can further strengthen the overall evaluation of a case study and support its competitiveness in the final selection.

Your case study will be shared with the analysts who lead specific ISG Provider Lens studies. ISG Provider Lens™ reports evaluate independent vendors and providers across a range of capabilities by topic and region. This mapping will also help the ISG team to better classify your client work for the candidate provider qualification (CPQ) process. Please select all the studies for which this case study will represent your credentials.

For this case study to be a valuable input, it is important that you include appropriate details as part of your submission. Please select the most appropriate study from the list.

- Advanced Analytics and AI Services
- Aerospace & Defense Services and Solutions
- Agentic AI Services and Solutions
- AI Services in Healthcare Industry
- AI Services in Life Sciences Industry
- AI-driven ADM Services
- AI-Ready Hardware Solutions
- Amazon Connect Ecosystem
- Automotive & Mobility Services & Solutions
- AWS Ecosystem Partners
- Cloudera Ecosystem

- Contact Center – Customer Experience Services

- Cyber Security – Services and Solutions

- Databricks Ecosystem

- Digital Engineering Services

- Digital Sustainability

- Duck Creek Services Ecosystem

- Enterprise Managed Network Services (MNS)

- Enterprise Service Management –Services (ESM)

- Finance and Accounting Outsourcing (FAO) – Services

- Financial Services – Banking Services

- Future of Work (Workplace) – Services

- Generative AI Services

- Global Capability Center (GCC) Services

- Google Cloud Partner Ecosystem

- Guidewire Services Ecosystem

- Healthcare Digital Services

- High-Tech and Semiconductor Industry — Services and Solutions

- Insurance Industry Services

- Intelligent Automation Services

- Intelligent Robotics & Physical AI Services

- Life Sciences Digital Services

- Mainframe Services and Solutions

- Manufacturing Industry Services and Solutions

- Medical Device Digital Services

- Microsoft AI and Cloud Ecosystem

- Multi Public Cloud Services and Solutions

- Network – Software Defined Solutions and Services

- Oil and Gas Industry – Services and Solutions

- Oracle Cloud and Technology Ecosystem

- Palantir Ecosystem Partners

- Payroll Managed Services

- Power & Utilities Industry – Services and Solutions

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- Private/Hybrid Cloud – Data Center Services and Solutions
- Procurement BPO Services
- Public Sector Services and Solutions
- Salesforce Ecosystem Partners
- SAP Ecosystem
- ServiceNow Ecosystem Partners
- Snowflake Ecosystem Partners
- Supply Chain Services
- Telecom, Media and Entertainment Industry Services and Solutions
- UKG Ecosystem
- Workday Ecosystem
- Not applicable

SECTION 1: CASE STUDY OVERVIEW

Case study summary

Provide a short description of the case study (scope, objectives, and summary of outcomes).

Do not exceed 400 characters.

_____

Engagement Model

Please select one

- Staff Augmentation
- Managed Capacity
- Managed Service
- BPO / BPaaS
- Virtual / Hybrid GCC
- Other (please specify) _____

On a scale of 1–5, how representative is this engagement of your typical client work?

(1 = Typical / repeatable engagement; 5 = Highly unique)

- 1= Typical/ Repeatable engagement

- 2
- 3
- 4
- 5 = Highly Unique

SECTION 2: CLIENT ENGAGEMENT CONTEXT AND COMPLEXITY

Describe the client's business context and strategic priorities.

_____

_____

Outline the client's key challenges and business pain points that triggered the engagement.

_____

_____

Describe the client's current technology landscape or operating environment before your intervention.

_____

_____

Based on this, how would you describe your client's strategic objective?

Please select all that apply

- Operational transformation or process optimization
- Digital transformation or modernization
- New customer or employee experience
- Innovation enablement
- New/disruptive business model
- Market expansion or growth
- Risk reduction and business resilience
- Sustainability / ESG impact
- Cost optimization / value realization
- Other (please specify) _____

Rate the overall complexity of the client environment.

- 1= Simple/ Straight forward
- 2
- 3
- 4
- 5 = Highly Complex

SECTION 3: SOLUTION DESIGN AND EXECUTION

Describe the proposed solution and its alignment to the client's objectives.

_____

_____

List any proprietary IP, accelerators, or frameworks used.

_____

_____

List partner technologies or platforms leveraged.

_____

_____

Explain your delivery approach (onshore/offshore/hybrid).

_____

_____

Describe the commercial model adopted (e.g., outcome-based, consumption-based, fixed, hybrid).

_____

_____

To what extent was this solution standardized or repeatable across other clients?

- Highly Customized

- Partially customized

- Plug and play accelerators with minimal customization

- Others (Please Specify) _____

SECTION 4: BUSINESS IMPACT AND OUTCOMES

What were some of the measurable outcomes achieved? How did this change during the tenure of the engagement?

Quantify on a yearly basis, if the engagement is new then quantify on half yearly basis.

_____

_____

Describe some of the non-tangible benefits delivered – driving cultural change, improved employee experience, better brand visibility, risk reduction).

_____

_____

On a scale of 1–5, how would you rate the overall business impact achieved relative to the client's initial goals?

1 = Minimal; 5 = Transformational impact.

- 1 = Minimal

- 2

- 3

- 4

- 5 = Transformational impactful

SECTION 5: ENGAGEMENT MATURITY AND PARTNERSHIP

How long have you been working with this client?

_____

_____

Describe how the relationship has evolved from tactical to strategic?

Outline any strategic goals achieved.

_____

_____

Describe how the partnership between your organization and the client was structured to ensure alignment of goals.

Explain how both parties established a shared vision and aligned their individual and collective objectives. Include any formal mechanisms (e.g., joint planning sessions, shared KPIs) used to maintain alignment throughout the engagement.

_____

_____

[In46] How did the partnership demonstrate transparency, mutual accountability, and adaptability throughout the engagement?

Provide examples of how open communication was maintained, how roles and responsibilities were clearly defined, and how the partnership adapted to changes in client needs or market conditions. Highlight any continuous improvement practices or governance models used.

_____

_____

How would you describe the relationship maturity?

- 1 = Very tactical
- 2
- 3
- 4
- 5 = Highly Strategic (Ex: client seeks our inputs to align their strategies)

SECTION 6: INNOVATION AND DIFFERENTIATION

[In33] Describe introductions of emerging technology, if any – like AI/ Agentic/ Other led enhancements introduced during this engagement and outline the outcomes / improvements

delivered specific to these introductions.

[In34] Were any co-innovation initiatives undertaken with the client or ecosystem partners?

[In35] Which of the following best describes the innovation engagement with the client?

- Minimal incremental changes

- Client was highly cooperative and drove the innovation along

- Extremely supportive on co-creation

- Innovation drove significant value driven changes

- Highly complex – siloed/ legacy heavy – low innovation readiness

- Other (please specify) _____

SECTION 7: SUSTAINABILITY AND CHANGE MANAGEMENT

Describe how you ensured long-term adoption and change management (training, communication, stakeholder buy-in).

_____

_____

Highlight any sustainability or ESG-related initiatives embedded in this engagement (e.g., energy efficiency, inclusion, carbon footprint).

_____

_____

Overall, as a provider, how would you rate your contributions to this engagement?

Please select all that apply

- Early-stage contribution – long way to go

- Gradual progress – pace influenced by client readiness

- Strong progress – notable improvements delivered

- High-impact contribution – proud of the progress and innovation achieved

- Other (please specify) _____

ISG

Client contact for case study validation

(Please check for spellings correctness)

- Client contact name _____
- Client job title _____
- Client contact email_____

Attach related documents.

Please note: Only one attachment, maximum 5MB. If needed, you can zip multiple attachments into a single file to upload. No password protected files or attachments. Supported file extensions for upload: .pdf, .xlsx, .pptx, .docx

- Context for attachment 1

Attach related documents.

Please note: Only one attachment, maximum 5MB. If needed, you can zip multiple attachments into a single file to upload. No password protected files or attachments. Supported file extensions for upload: .pdf, .xlsx, .pptx, .docx

- Context for attachment 2

Attach related documents.

Please note: Only one attachment, maximum 5MB. If needed, you can zip multiple attachments into a single file to upload. No password protected files or attachments. Supported file extensions for upload: .pdf, .xlsx, .pptx, .docx

- Context for attachment 3

Provide related links that are publicly accessible.

(ISG will not access any links with access controls.)

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